

# ASEAN Early Warning Information

## CROP SITUATION

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Crop Situation in 2023 (P.1/2)

The weather in Brunei Darussalam in 2023 (2023/2024) is favorable for cultivating crops with sufficient sunlight for the plants, and good water management and irrigation systems in the country, these allow farmers to grow crops for the whole year. In 2023, the rainfall average is lower than the norm except between July and August 2023. However, irrigation infrastructure enables rice fields to be irrigated during less rainfall periods. Thus, the government and farmers collaborate in water management to effectively reduce damage from these situations and support new technologies to farmers by improving irrigation facility systems to mitigate the risks of low water levels in the dams. While farmers adjusted their cultivation plan or new planting times to be suitable for changes in weather patterns. In the comparison of imports by production between 2022 and 2023, there is a notable trend. Rice, maize, and sugar imports have increased during this period. On the contrary, soybean and cassava imports have decreased. The situation of main crops can be described as follows.

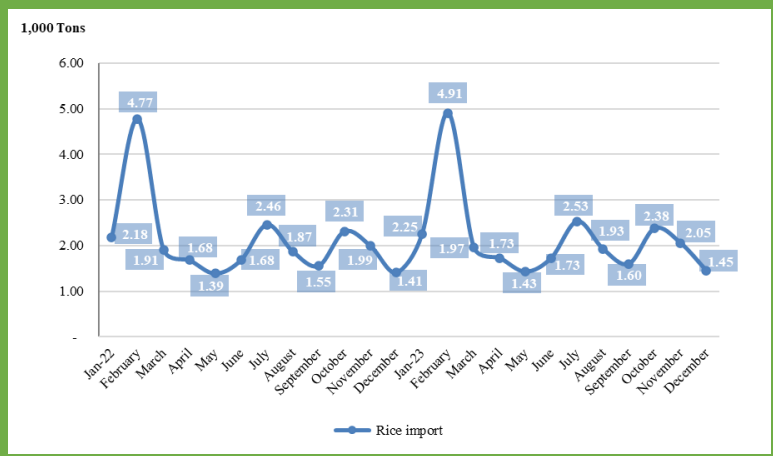


Figure 1: Monthly quantity of rice import in 2022-2023

**Rice production** is predicted to increase due to an increase in planted areas and yield. This expansion is anticipated due to favorable weather conditions for crop cultivation, effective water management, and an irrigation system, all in alignment with government policies aimed at expanding commercial rice production in KANDOL (Kandol Agriculture Development Area). Furthermore, rice yields are expected to increase as farmers adopt improved rice management practices and increase supply for more hybrid rice seed varieties, such as "Sembada 188," for high yielding. The overall increase in rice production can also be attributed to factors such as favorable weather conditions, diligent crop care, increased fertilizer usage, and rice varieties. The harvesting period of rice in 2023 is from February to May 2023 in the wet season, and from July to October 2023 in the dry season.

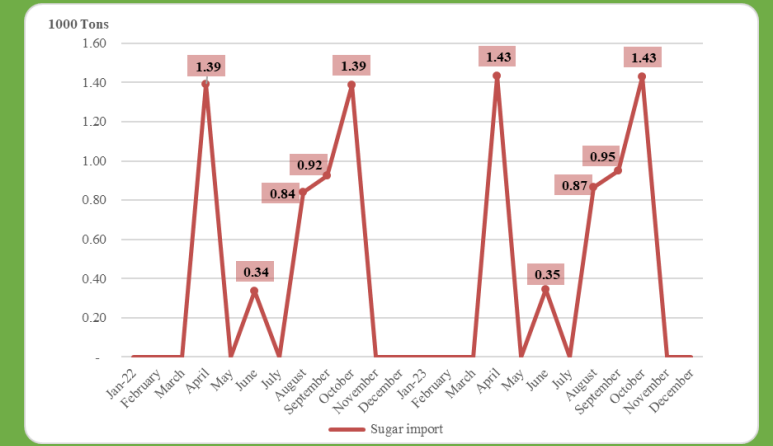


Figure 2: Monthly quantity of sugar import in 2022-2023

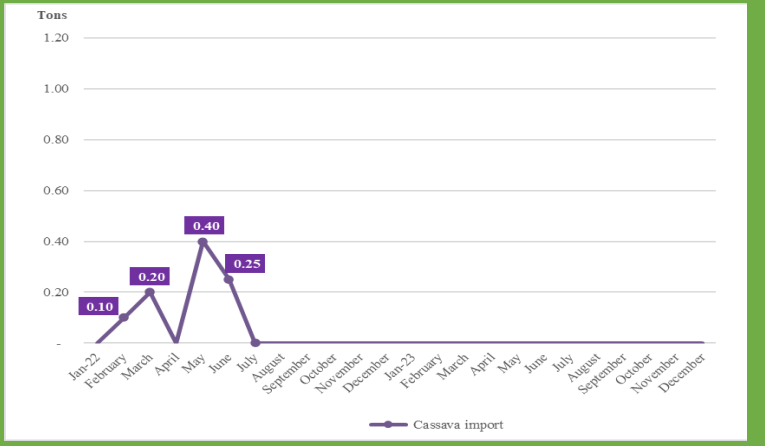


Figure 4: Monthly quantity of cassava import in 2022-2023

**For sugarcane** production is expected to decline, primarily due to the replantation of sugarcane and crops not being ready for harvest, which has had an adverse impact on overall production. Additionally, some farmers have chosen to discontinue sugarcane cultivation and have shifted their focus towards the cultivation of other crops.

**Cassava** is projected to experience an increase in both planted area and production. This growth can be attributed to farmers responding to price increases, coupled with their dedicated care of the crop and the adoption of high-quality varieties. Additionally, there is a growing demand for value-added and downstream processed products, including items like crisps, fritters, and desserts, which further incentivize cassava cultivation.



# Brunei Darussalam



## Crop Situation in 2023 (P.2/2)

**For maize**, it is projected that the planted area and production will increase compared to the previous year due to several factors. Firstly, the favorable weather conditions support crop cultivation, and additionally, farmers are responding to price increases, which incentivize corn farmers to expand their planted areas. This expansion can also be attributed to farmers' choices for crop rotation and the high demand from consumers for maize products. Another significant factor contributing to the increase in maize production is the diligent care taken by farmers in nurturing their crops. They are using high-quality varieties and employing enhanced agricultural practices, including increased fertilizer usage, resulting in higher yields.





### Crop Situation in 2023

**The overall weather in Cambodia in 2023 (2023/2024)** is favorable for cultivating crops. With low rainfall, and amount of rain ranges from 0.5 – 20 millimeters (mm.) per day. However, the average annual rainfall in Cambodia is 1400 mm. in the Central lowland regions and may reach 4000 mm. in certain coastal zones or in highland areas. The annual average temperature is 28 °C, with a maximum average of 38 °C in April, and a minimum average of 17 °C in January. Mostly Cambodia’s natural disasters are floods and droughts. Those areas with floods are Kampong Thom, Banteay Meanchey, Kampong Cham, Kampot, Kampong Speu, while some regions which are Banteay Meanchey and Battambang occurred droughts.

**Cambodia has indeed been affected by climate change and global warming**, leading to significant challenges in its agricultural sector. These challenges include extreme rainfall conditions associated with La Nina, resulting in extreme floods. In response to these changing weather patterns and the increased frequency of extreme events, farmers have adapted by adjusting their cultivation plans and planting times. They have also chosen crop varieties that are more resistant to the effects of climate change. The government has played a crucial role in mitigating the impact of global warming and climate change on agriculture. It has supported the adoption of new agricultural technologies by farmers, which can enhance resilience and improve crop yields. Additionally, the government has provided assistance in terms of market access and water management practices, helping farmers better cope with the changing climate and reducing the damage to their crops.

**For rice** in the current year, the planted area for **rice** is anticipated to expand due to rising prices and government initiatives aimed at supplying seeds to areas damaged by floods or droughts. As a result, rice production is expected to increase as farmers apply more fertilizer and adopt improved agricultural practices to enhance yields. The situation of export, rice export increased because the report of the Cambodian Rice Federation, on September 9, 2023, stated that in the first eight months of 2023, Cambodia exported 401,699 tons of rice by 55 rice exporters. China and Hong Kong were the largest importers of rice from Cambodia at 143,818 tons, valued at US\$91.64 million, while European countries exported rice from Cambodia at 164,682 tons, valued at US\$113.73 million. 5 ASEAN member countries exported from Cambodia 36,692 tons, valued at US\$23.64 million, and 22 other destinations in Middle East Africa export from Cambodia at 56,507 tons, valued at US\$49.58 million. The highest export product demands include the following: all types of fragrant rice, 81.93%, white rice, nearly 12.99%, steamed rice, 3.33%, organic rice, 1.73%, and short grain rice, 0.02%. At the same time, Cambodia also exported 2,929,043 tons of rice worth about US\$814.17 million, of which more than 59% were exported through the request for certification of export documents from the competent authorities. The harvesting period of rice in 2023 is from August to December 2023 for wet season, and from February to April 2023 for dry season.

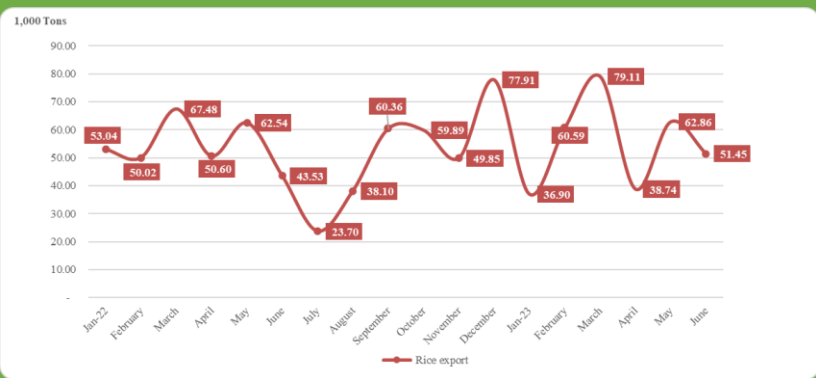


Figure1: Monthly quantity of rice export in 2022-2023

**For soybean**, the planted area for soybean is forecast to decrease compared to the previous year, influenced by increased prices of competing crops and unfavorable weather conditions. Additionally, soybean production is expected to decline due to the impact of floods. The harvesting period for soybean in 2023 is set to occur during September to October 2023.

**For maize** in the upcoming year, the planted area for maize is expected to expand compared to the previous year, driven by rising prices and favorable weather conditions. This increase in maize production is anticipated to be further boosted by farmers adopting improved crop varieties and increasing fertilizer use. The maize harvesting period is projected to be from July to September 2023 for wet season and from February to May 2023 for the dry season.

**For sugarcane**, the planted area for sugarcane is projected to decrease compared to the previous year, primarily due to the increased prices of competing crops. Despite this decrease in planted area, sugarcane production is expected to rise because farmers are focusing on good crop management practices and utilizing improved varieties. The harvesting period for sugarcane in 2023 is scheduled for November 2023 through December 2023 or extending into January 2024.

**For cassava**, the planted area for cassava is anticipated to decrease compared to the previous year, primarily due to the high cost of input varieties and labor. Furthermore, cassava production is expected to decline due to adverse weather conditions, particularly the impact of flooding. The harvesting period for cassava in 2023 is scheduled for November 2023 through January 2024.



# INDONESIA



## Crop Situation in 2023 (P.1/2)

The weather in Indonesia in 2023 (2023/24) is favorable for growing crops as there are suitable sunlight (5-9 hours/day), the proper temperature around 27-29 C°, adequate rainfall for crops and irrigation systems for planting crops. The Indonesia has the opportunity to rain with 1.) the low category is (0 – 100 mm./month) in July, 2.) the low to medium (100 – 300 mm./month) is generally in September to November, and 3.) high category is over 300 mm./month in March to April. The climate change or current global warming affect the agricultural products of Indonesia. it is predicted that ENSO will remain NEUTRAL until mid-2023. There is a 50-60% El Niño chance in August-September-October 2023. Further observations starting in August 2023, El Niño is predicted to become dominant, with a probability of 78-87%. While the El Niño is predicted to remain at moderate levels from December 2023-February 2024. The total damaged areas caused by climate change or global warming include Rice (60,330 hectares), Maize (1491 hectares), Soybean (334 hectares). As a result of climate change or global warming has been occurred in recent year so farmers and government have dealt with these situations by farmers choose to plan other commodities (other food crops or horticulture) that are more resistant to drought. Moreover, the government implements various policies to mitigate risks and damage that might occur from natural disasters for farmers by increasing water availability by building/repairing reservoirs, trench dams, deep wells, infiltration wells, rehabilitation of tertiary irrigation networks, and pumping, the provision of drought-resistant and pest and diseases seeds, El-Nino National Movement (Gernas) in 10 Provinces and 100 Districts, KUR and agricultural insurance financing support. Kredit Usaha Rakyat (KUR) is a low-interest government-subsidized financing/credit program, which is 100% owned by non-bank financial banks/financial institutions (LKBB). KUR is distributed in the form of funds for working capital and investment needs.

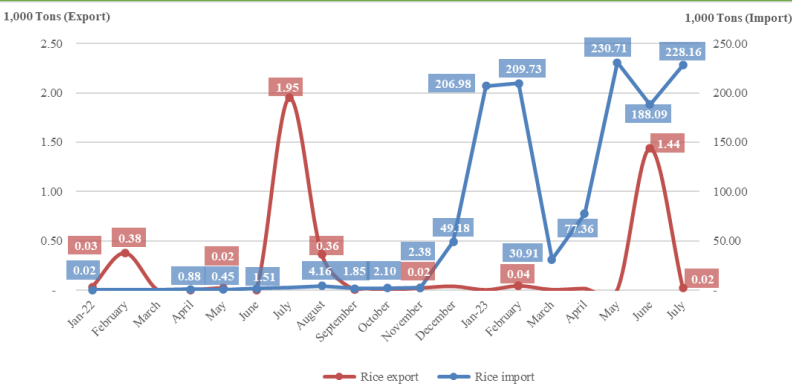


Figure 1: Monthly quantity of rice import and export in 2022-2023

**Rice production** is anticipated to rise owing to the expansion of planted areas. Concurrently, the situation of rice imports is also increasing, primarily because the imported rice serves as a crucial component of the national food reserve. This reserve is maintained by the government to be distributed to the public in the event of food shortages, ensuring food security. Rice production is expected to good favorable weather conditions, and the Ministry of Agriculture's efforts to promote increased rice production through the extension of the rice planting program. Farmers are contributing to this growth by selecting and cultivating high-quality rice varieties and providing meticulous care to their crops. These efforts collectively contribute to higher yields and a more robust rice production sector. The harvesting periods in 2023 are from October 2022 to March 2023 for the wet season and from April 2023 to September 2023 for the dry season.

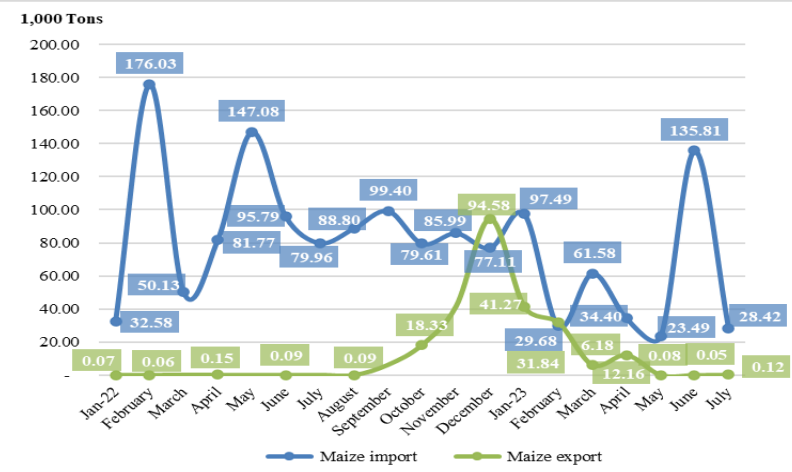


Figure 2: Monthly quantity of maize import and export in 2022-2023

**Maize production** is forecast to increase due to the expansion of planted areas because the weather is suitable for planting crops and the price of maize is increasing. Farmers also take good care of crops and select to use good varieties together. The harvesting period of maize in 2023 can be divided into 3 periods which are January to April 2023 for the first crop, May to August 2023 for the second crop, and September to December 2023 for the third crop.

**Sugarcane production** is expected to increase significantly to the expansion of planted areas, driven by a sugarcane planting area extensification program. Additionally, the intensification program, which involves the ratoon treatment of sugarcane plants, is contributing to this growth. These combined efforts reflect a proactive approach to boosting sugarcane production. The harvesting period in 2023 is from January 2023 to November 2023.



# INDONESIA



## Crop Situation in 2023(P.2/2)

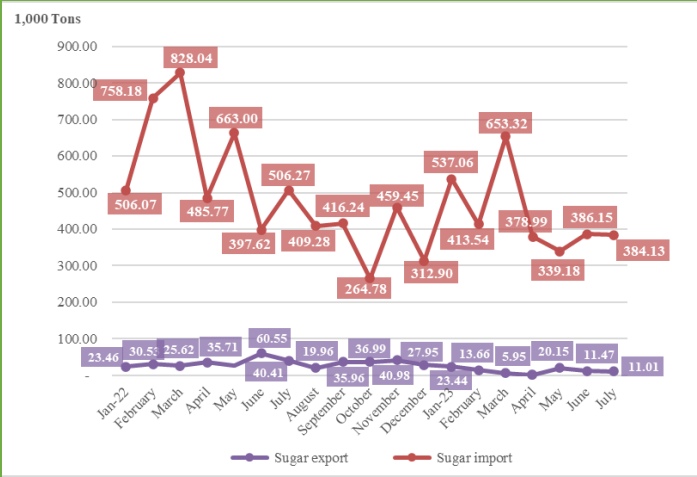


Figure 3: Monthly quantity of sugar import and export in 2022-2023

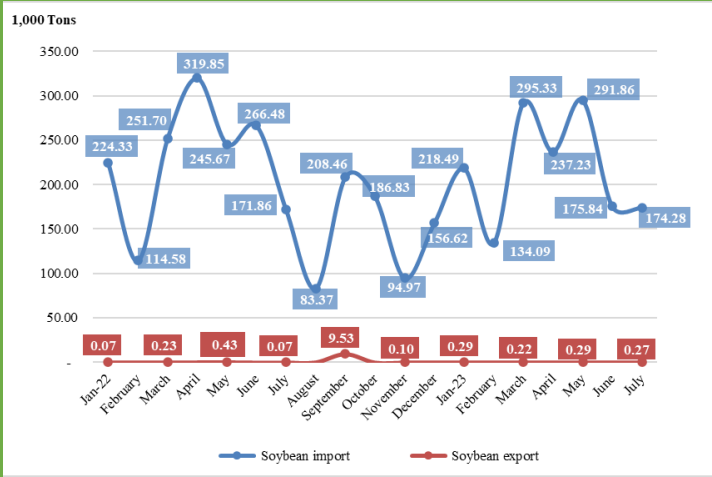


Figure 4: Monthly quantity of soybean import and export in 2022-2023

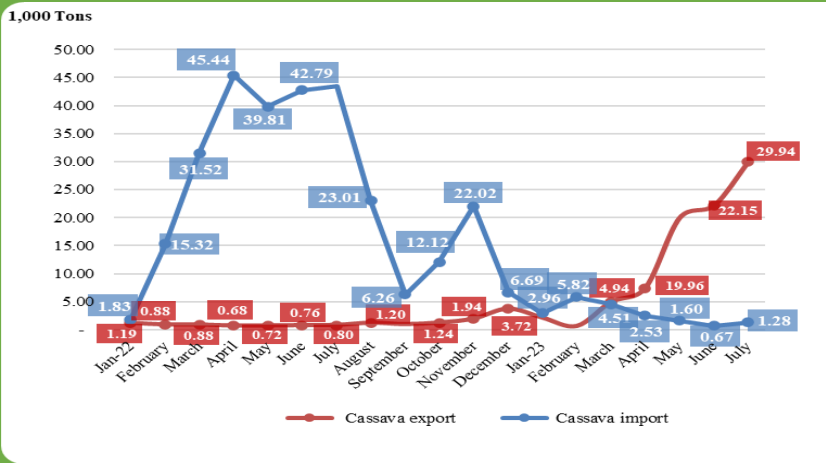


Figure 5: Monthly quantity of cassava import and export in 2022-2023

**Soybean production** is forecast to increase due to the expansion of planted areas. The planted area is expected to increase due to favorable weather with the Ministry of Agriculture encourages an increase in soybean production by extending the rice planting program. The farmers use good variety and, take good care of their crops from the planting period to the harvesting period resulting in an increase in yield. The harvesting periods of soybeans in 2023 are divided into 3 phases which are January to April 2023 for the first crop, May to August 2023 for the second crop, and September to December 2023 for the last crop.

**Cassava production** is forecast to increase due to the expansion of planted areas because the weather is suitable for planting crops and the price of cassava is increasing. Farmers also take good care of crops, select to use good varieties, and use more fertilizer. The harvesting period of cassava in 2023 can be divided into 3 phases which are January to April 2023 for the first crop, May to August 2023 for the second phase, and September to December 2023 for the last crop.



# LAO PDR



## Crop Situation in 2023 (P.1/2)

In 2023 (2023/2024), the weather situation in Lao PDR featured moderate rainfall, with daily precipitation ranging from 20 to 50 millimeters. However, the impact of climate change, specifically characterized by extreme rainfall conditions associated with La Nina, led to an extraordinary event—an extreme flood. This flood event affected ten provinces located in the central and northern regions of Lao PDR. Furthermore, some planted areas of rice in the Northern part of the country were also damaged by pests. These pest-related issues could potentially affect rice yields and agricultural productivity in the affected areas. Despite the challenges posed by extreme weather events and pest-related issues, the government has been proactive in supporting the agricultural sector by implementing various new technologies and expanding channels for farmers to access credit. These measures provide farmers with the tools and financial resources needed to adapt to changing conditions and invest in sustainable farming practices. Additionally, the collaborative efforts between farmers and the government in water management have proven instrumental in mitigating the damage caused by natural disasters.

Compared to the previous year, **import trends** for various agricultural products have shifted in Lao PDR. Import volumes have increased for rice, sugar, and cassava due to a decrease in domestic production. Conversely, imports for maize and soybeans have decreased as a result of increased domestic production.

Compared to the previous year, **export trends** for various agricultural products in Lao PDR have undergone significant changes. Import volumes have increased for maize, sugar, and cassava, driven by rising demand from trading countries and increased domestic production. Conversely, exports of rice and soybeans have decreased. The decrease in rice exports can be attributed to high domestic rice production, prompting farmers to retain their production for consumption due to favorable pricing. The decrease in soybean exports is primarily due to limited domestic production, resulting in reduced quantities available for export.

**For rice**, the planted areas are expected to increase due to the increase in the price of rice, the decrease in the price of competing crops, and the government policy for supporting exports. The production is expected to increase as farmers take good care of crops and use good variety together with favorable weather. Although some areas in the country were affected by flood (the total damaged areas are 9.695 hectares caused by the climate change and global warming of the total damaged areas). The harvesting period of rice in 2023 is from October 2023 to December 2023 for wet season, and from March 2023 to May 2023 for dry season.

**For maize**, the planted area and the yield are estimated to decrease due to the increase in the price of competing crops and unfavorable weather. The yield is expected to decrease because of unfavorable weather. The harvesting period of maize in 2023 is from September 2023 to November 2023 for wet season, and from January 2023 to May 2023 for dry season.

**For sugarcane**, the planted area and the yield are estimated to decrease due to the farmer response to price decrease, the increase in the price of competing crops and unfavorable weather. The yield is expected to decrease because of unfavorable weather. The harvesting period of sugarcane in 2023 is from January 2023 to May 2023.

**For soybean**, the planted areas are expected to increase due to the increase in the price of soybean, the decrease in the price of competing crops. The harvesting period of soybean in 2023 is during September 2023 to November 2023 for wet season and February 2023 to March 2023 for dry season.

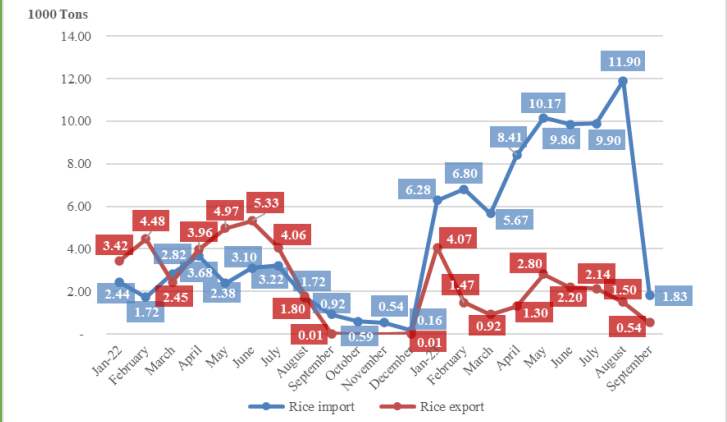


Figure 1: Monthly quantity of rice import and export in 2022-2023

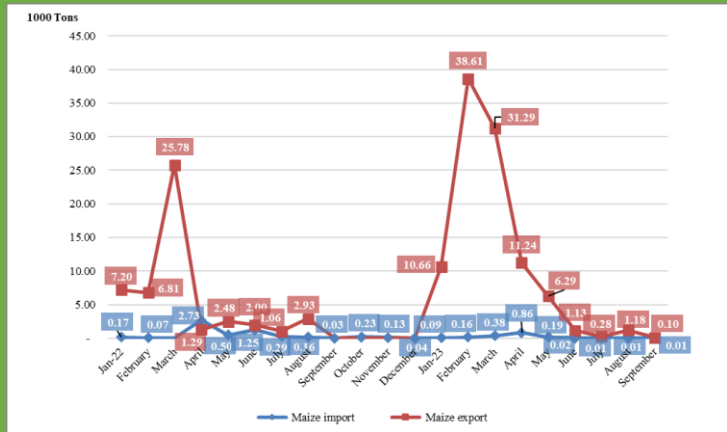


Figure 2: Monthly quantity of maize import and export in 2022-2023



LAO PDR



Crop Situation in 2023 (P.2/2)

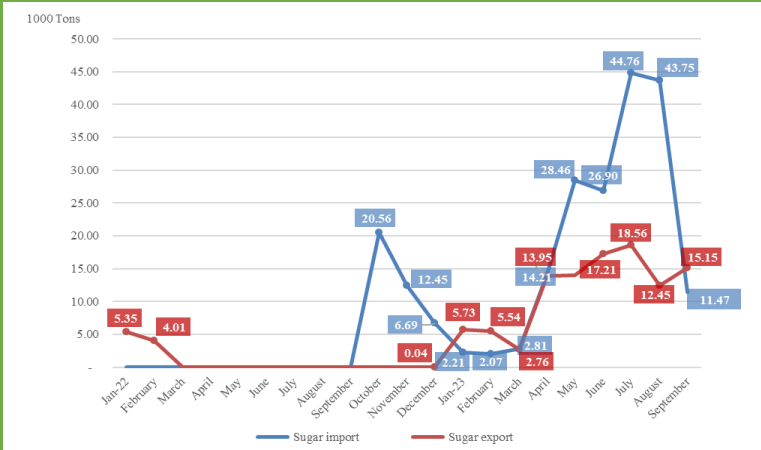


Figure 3: Monthly quantity of sugar import and export in 2022-2023

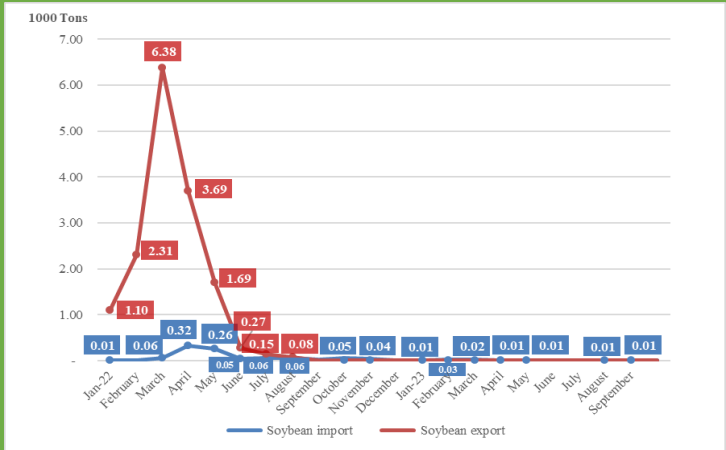


Figure 4: Monthly quantity of soybean import and export in 2022-2023

The production of cassava is forecast to increase due to the increase in planted area and yield. The planted area is expected to increase due to the increase in the price of cassava and the decrease in the price of competing crops. The yield is expected to increase because of good taking care of the crops by farmers and using good variety. The harvesting period of cassava in 2023 is from December 2023 to May 2024.

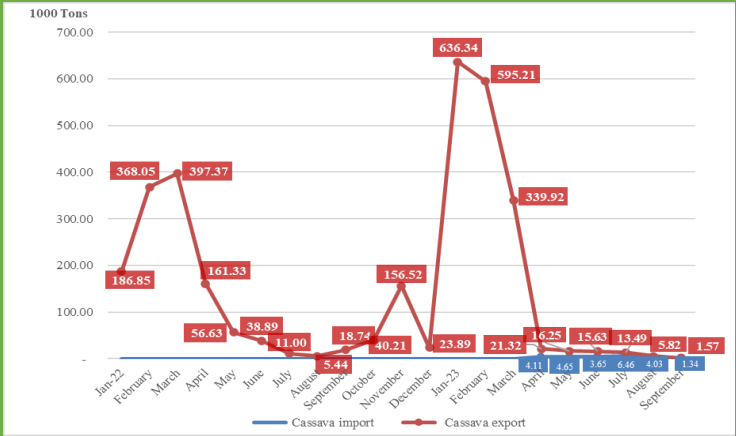


Figure 5: Monthly quantity of cassava import and export in 2022-2023







# MALAYSIA



## Crop Situation in 2023 (P. 1/2)

In 2023 (2022/2023), Malaysia faced a significant natural disaster in the form of widespread flooding, primarily occurring from November 2022 to February 2023. These floods resulted in substantial damage across multiple provinces, including Johor (specifically Mersing), Melaka (Jasin), Negeri Sembilan (Jelebu, Jempol, Tampin), Perak (Hilir Perak), Sarawak (Siburan), Sabah (Nabawan, Sook, Kudat, Ranau, Sipitang, Telupid, Kota Belud), and Pahang (Pekan). Unfortunately, specific figures regarding the extent of the damage and its impact on crop production are not provided. Additionally, the situation was compounded by the ongoing COVID-19 pandemic.

**In the situation of imports,** there are distinct trends in Malaysia's agricultural sector in 2023. Import volumes for rice, sugar, and cassava have all shown an increase compared to previous years, whereas imports of maize and soybeans have declined. The increase in rice imports is primarily driven by factors such as population growth and evolving consumer preferences, as these factors contribute to a higher demand for rice in the domestic market. Similarly, the uptick in sugar imports can be attributed to a surge in demand for sugar products, reflecting changing consumption patterns and preferences among the population. Meeting this heightened demand necessitates increased imports. In the case of cassava, the rise in imports in 2023 is linked to the food processing industry's growing demand for cassava as a raw material. Additionally, a shortfall in domestic cassava production has further fueled the need for increased imports. Conversely, maize imports have decreased due to a combination of factors. These include a rise in domestic maize production, shifting preferences in livestock feed, and fluctuating global maize prices. These factors have collectively contributed to a reduced reliance on maize imports. Furthermore, preliminary data suggests that Malaysia did not import soybeans in 2023, potentially indicating a shift in the soybean market dynamics or supply sources during that year.

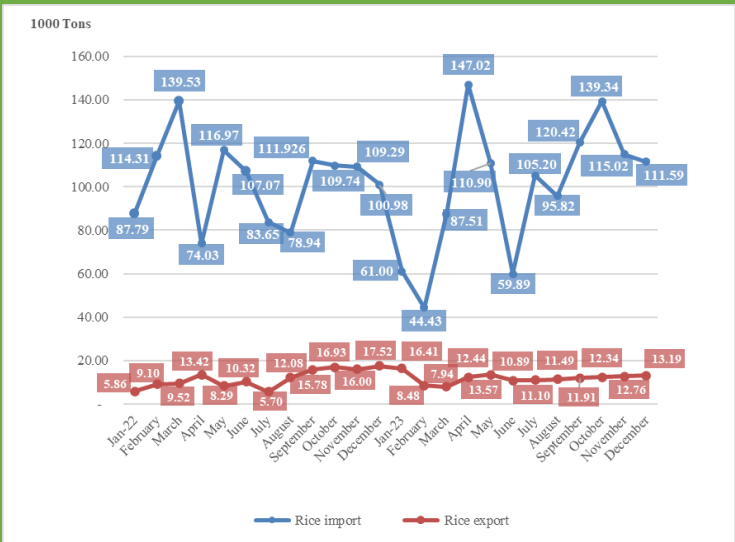


Figure 1: Monthly quantity of rice import and export in 2022-2023

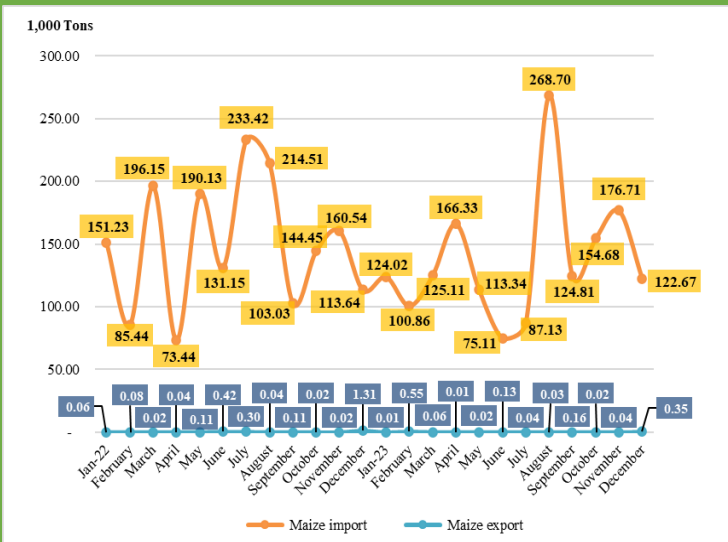


Figure 2: Monthly quantity of maize import and export in 2022-2023

**In the situation of exports,** Malaysia has witnessed distinct trends in its agricultural sector in 2023. Export volumes for rice and cassava have shown an increase compared to previous years, while exports of sugar, maize, and soybeans have experienced a decline. The rise in rice exports in 2023 can be attributed to a combination of favorable weather conditions, improved agricultural practices, and heightened demand from international markets. These factors have collectively bolstered Malaysia's position as a rice exporter. The cassava exports during 2023 can be attributed to increasing international demand, advances in agricultural practices, and deliberate efforts to expand cassava production to cater to global market needs. This reflects Malaysia's commitment to meeting the requirements of international buyers. On the contrary, the decline in maize exports can be attributed to a drop in domestic production, primarily due to adverse weather conditions and a shift in priorities towards fulfilling domestic demand. The reduction in maize exports underscores the challenges faced in maintaining a competitive export position. Preliminary data indicates that Malaysia did not engage in soybean exports in 2023. This could signify a decrease in soybean production, as there were no exports during that period. Lastly, sugar exports also experienced a decrease in 2023.





Crop Situation in 2023 (P. 2/2)

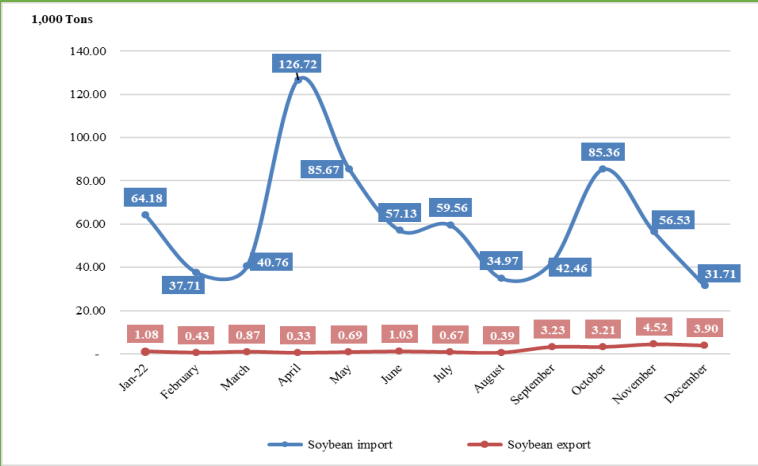


Figure 3: Monthly quantity of soybean import and export in 2022-2023

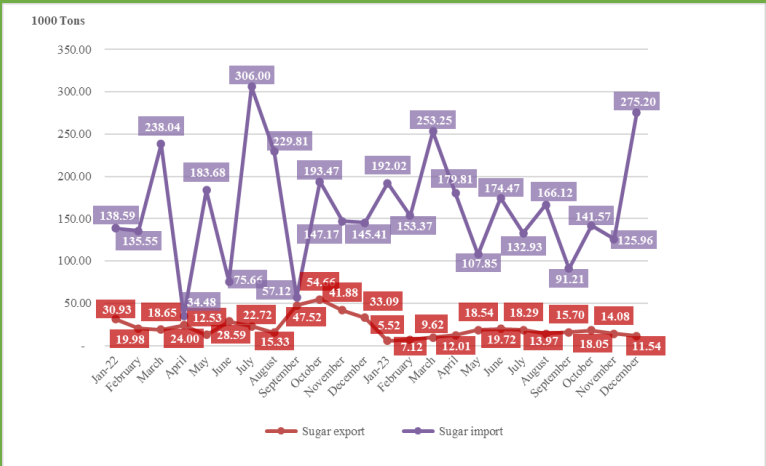


Figure 4: Monthly quantity of sugar import and export in 2022-2023

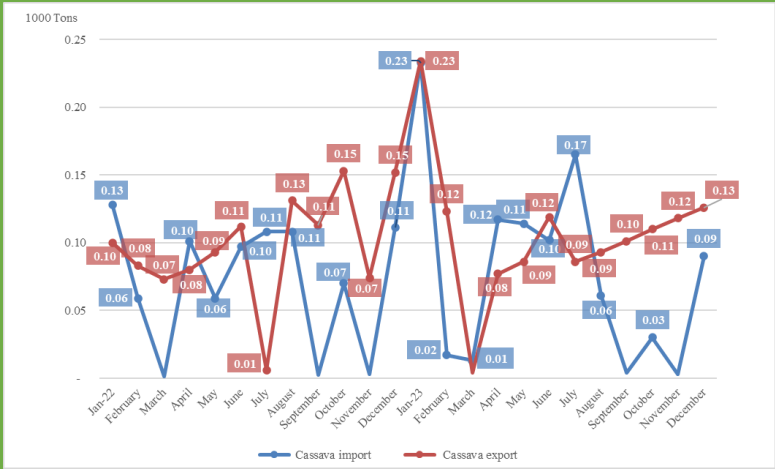


Figure 5: Monthly quantity of cassava import and export in 2022-2023



Crop Situation in 2023 (P. 1/2)

Myanmar has experienced unusual weather patterns in 2023 (2023/2024), marked by low rainfall in several regions, averaging between 0.5 to 20 millimeters per day. **However, abundant sunlight and an efficient irrigation system mitigate dry season challenges.** Climate change and global warming impacts were evident as certain regions faced floods and temperatures hotter than usual during both day and night. The climate change and the global warming situation in Myanmar affected to floods disasters in Kachin, Kayin, Bago, Magwe, Mon, Rakhine, Yangon and Shan. To counter these effects on agriculture, the Myanmar government has supported farmers with new technologies and increased credit access. Collaborative water management efforts and the adoption of climate-resistant crop varieties have been encouraged. Despite these measures, some areas still suffered damage. In 2023, the agricultural landscape in five mains crops; rice, maize, sugarcane, soybean, and cassava in Myanmar experienced growth in planted areas attributed to several key factors. To ensure food security, both import and export of key agricultural products are expected to increase.

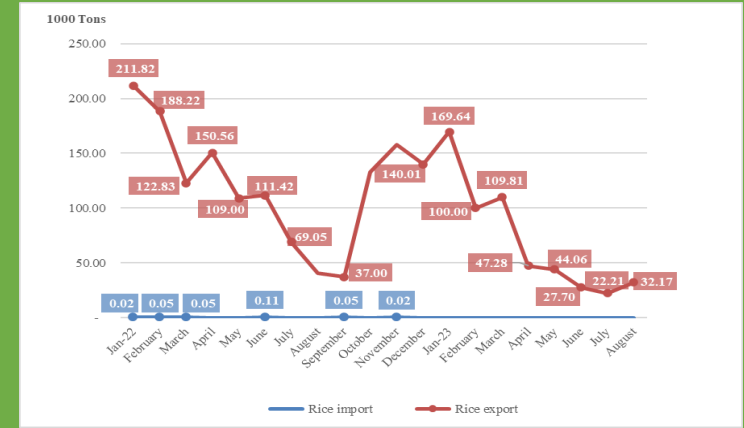


Figure 1: Monthly quantity of rice import and export in 2022-2023

Similarly, **maize production saw an expansion in planted areas** due to farmers' favorable response to price increases and advantageous weather conditions, marked by sufficient sunlight. Maize harvesting are from August 2023 to December 2023 for the wet season and from January 2024 to June 2024 for the dry season.

**For rice cultivation,** farmers responded to price increases, coupled with favorable weather conditions characterized by abundant sunlight. The harvesting periods for rice are from August 2023 to February 2024 for the wet season and from February 2024 to August 2024 for the dry season.

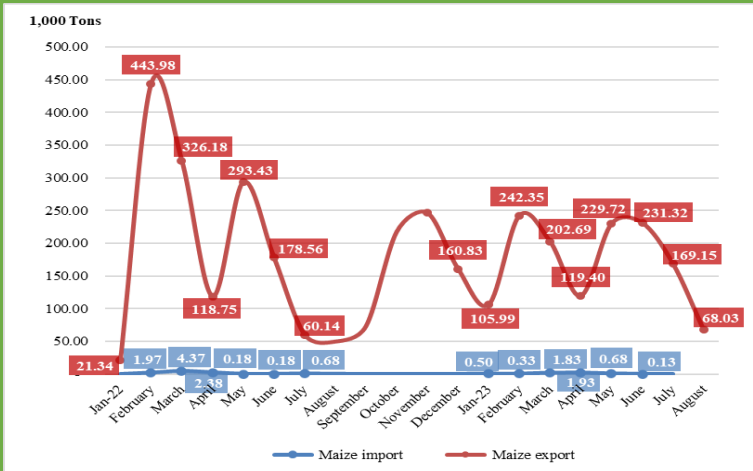


Figure 2: Monthly quantity of maize import and export in 2022-2023

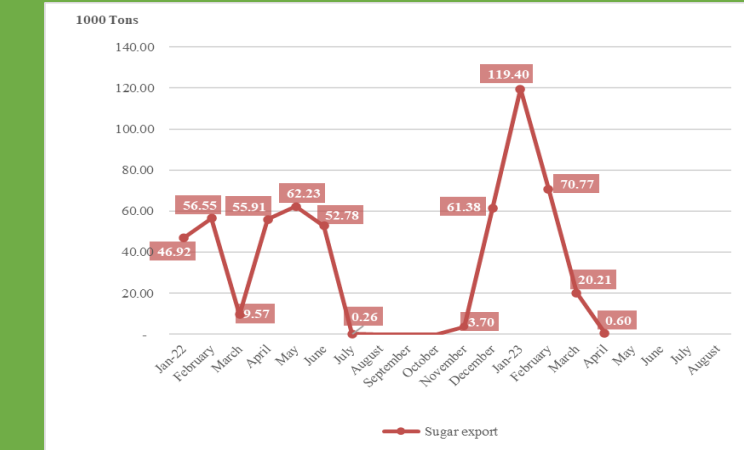


Figure 3: Monthly quantity of sugar export in 2022-2023

**Sugarcane cultivation** experienced growth in planted areas, driven by farmers' positive response to price increases and favorable weather conditions, including ample sunlight. The harvesting period for sugarcane is from October 2023 to March 2024.





Crop Situation in 2023 (P. 2/2)

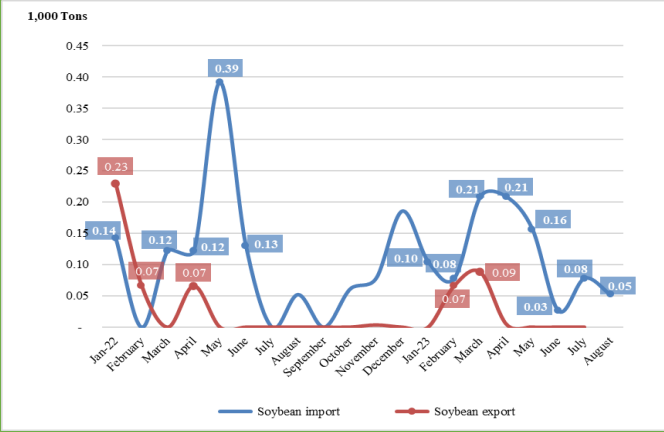


Figure 4: Monthly quantity of soybean import and export in 2022-2023

**Soybean cultivation** expanded its planted areas, with farmers responding positively to price increases and benefiting from favorable weather conditions. The harvesting period for soybean are from August 2023 to January 2024 for the wet season and from December 2023 to May 2024 for the dry season.

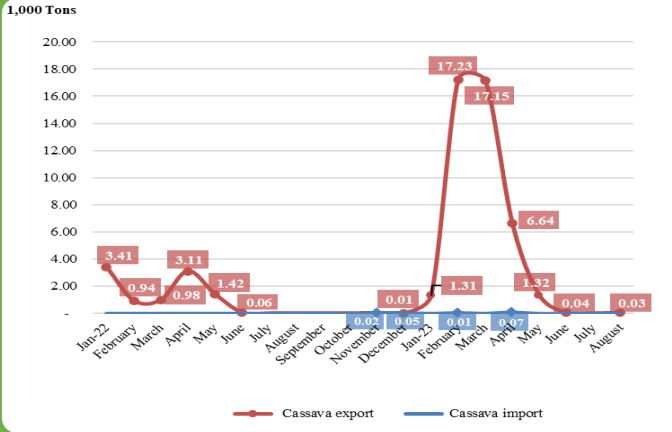


Figure 5: Monthly quantity of cassava import and export in 2022-2023

Lastly, **cassava production** witnessed an increase in planted areas due to farmers' responsiveness to price increases and the presence of favorable weather conditions, characterized by ample sunlight. The harvesting period for cassava is from September 2023 to June 2024.



# The Philippines

## Crop Situation in 2023 (P.1/2)

The crop conditions in the Philippines for the year 2023 (2023/24) have been greatly affected by a series of natural disasters that occurred in 2022. These disasters included Super Typhoon Henry in August 2022, Super Typhoon Karding in September 2022, Tropical Depression Maymay, Typhoon Neneng, and Severe Tropical Storm Paeng in October 2022, as well as the Northeast Monsoon, and Shearline, characterized by strong winds and heavy rains, that persisted from December 2022 to February 2023. Further challenges came with Tropical Depression Amang in April 2023 and Tropical Storm Dodong, Super Typhoon Egay, and Typhoon Falcon in July 2023. The damage caused by these natural disasters was primarily due to strong winds and heavy rainfall, with daily volumes ranging from 100 to 150 millimeters. Additionally, the occurrence of extreme drought conditions, associated with El Nino, further exacerbated the challenges faced by the agricultural sector in the country. To address these issues and mitigate risks and damage to farmers, the government implemented various policies. These included supporting the adoption of new agricultural technologies by farmers to enhance resilience and productivity. Moreover, efforts were made to increase access to credit for farmers, enabling them to cope with the financial strains brought about by the adverse effects of these natural disasters. These measures aimed to provide support and stability to the agricultural community in the face of unpredictable and challenging climatic conditions.

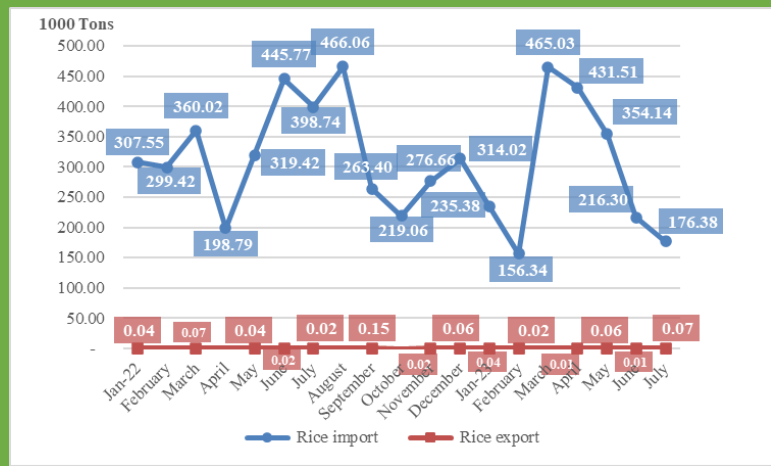


Figure 1: Monthly quantity of rice import and export in 2022-2023

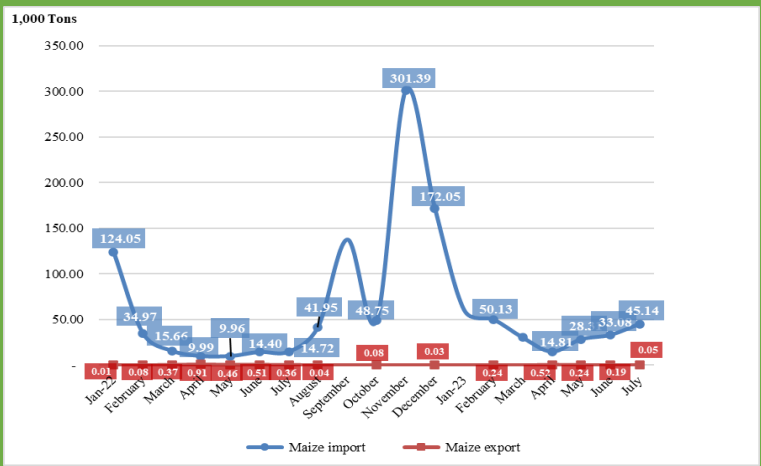


Figure 2: Monthly quantity of maize import and export in 2022-2023

**For rice**, the production is estimated to increase. The increasing in the production area is due to favorable weather conditions and the cultivation of rice varieties. Furthermore, government support in the form of subsidies, including cash, fertilizer, and seeds, has played a crucial role in boosting rice production. The harvesting period of rice in 2023 is from July 2022 to December 2022 for wet season, and from January 2023 to June 2023 for dry season.

**Maize production** is anticipated to experience a notable increase. This growth in production area can be attributed to favorable weather conditions, the cultivation of improved maize varieties, and the application of increased fertilizer usage. Additionally, the reduced occurrence of pests and diseases has played a role in contributing to the overall increase in maize production. The harvesting period of maize in 2023 is from July 2022 to December 2022 for wet season, and from January 2023 to June 2023 for dry season.

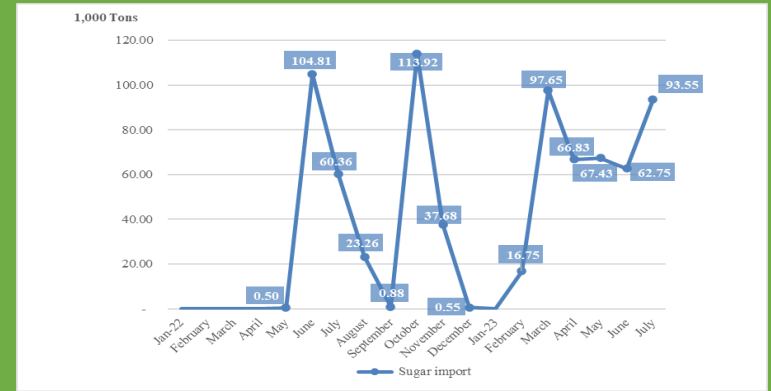


Figure 3: Monthly quantity of sugar import in 2022-2023

**The sugar import situation in 2022-2023**, the raw sugar production is placed at 1.799 million metric tons. The Sugar Regulatory Administration (SRA) anticipates an increase in domestic demand for sugar due to the easing of restrictions brought about by the pandemic. Unpredictable weather conditions are also considered to affect the production estimates for the next crop year (2022/2023). This needs to have a responsive and pre-emptive measure to maintain a balanced supply and demand of sugar for domestic consumption while ensuring stable prices.



# The Philippines



## Crop Situation in 2023 (P.2/2)

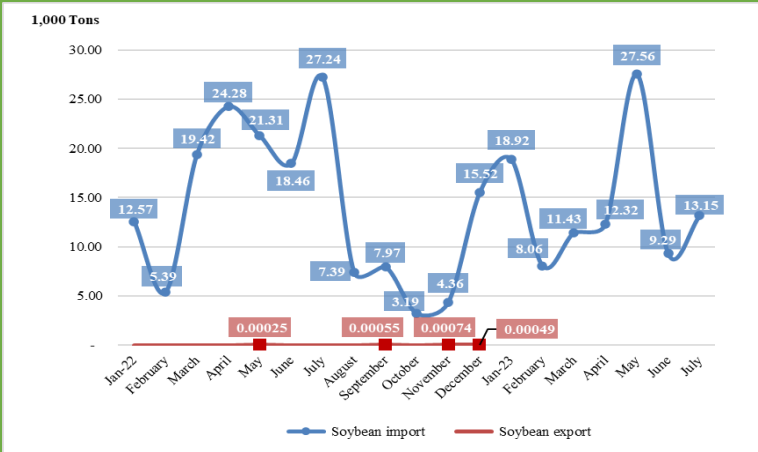


Figure 4: Monthly quantity of soybean import and export in 2022-2023

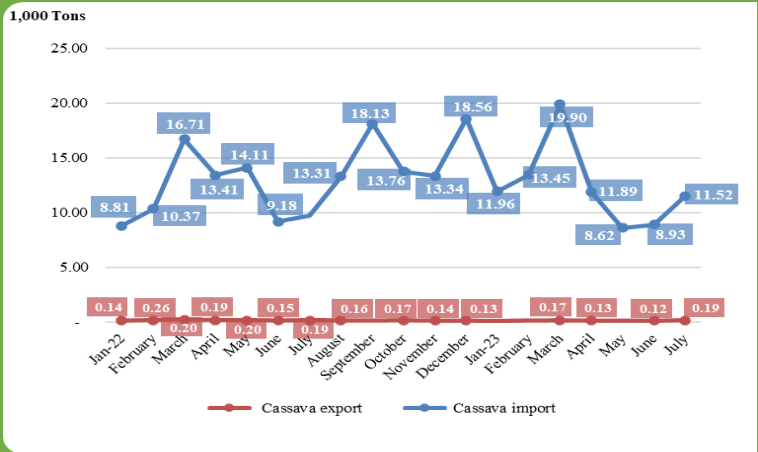


Figure 5: Monthly quantity of cassava import and export in 2022-2023







Crop Situation in 2023 (P.1/2)

**The weather in Thailand in 2024 (2023/2024) compared to 2023 (2022/2023)** has unfavorable weather with insufficient rainfall and improper temperature of 38-42 C°, higher than normal 1-3 °C. The amount of rain ranges from 0.5 to 20 millimeters per day, it is less than usual and nationwide rainfall being 20% below average, and dry spells in many areas until August 2023. The spread of COVID-19, it does not affect the agricultural production as the production begins to come back to a normal state in order to provide enough for domestic consumption and maintain food security. Moreover, agricultural products in Thailand have been affected by climate change and global warming situations. These situations that have occurred in Thailand were extreme drought **conditions** (El Nino) that occurred during the year and natural disasters include droughts in Whole Kingdom. As the farmers are still facing damaged areas caused by climate change or global warming so they adapt to this situation by mitigate the risks and damage that might occur droughts. Therefore, the farmers adjusted their cultivation plan or new planting times to suitable for changing in weather patterns. As the result, rice, maize and cassava had some damage area affected by climate change and global warming.

**In terms of importing situation in 2023**, the import of maize is expected to increase because domestic production is not enough to meet the demand of the animal feed industry. **The import of soybean is also expected to increase** because the domestic production is insufficient to meet the demand of entrepreneurs in food product processing caused by the increasing demand for healthy food. **The import of sugar is also expected to increase** because domestic demand has surged due to the gradual recovery of the tourism industry, increased need for sugar in food and beverage sectors, rising demand for molasses in alcohol disinfectant production, rising ethanol consumption in transportation after economic recovery, increased infrastructure investments and tourist travel, government support for ethanol in gasohol, and a growing number of gasohol-fueled cars. **The cassava has been imported from other countries**, domestic production falls short of meeting the requirements of both entrepreneurs and exporters. There is a need for processing, collection, and quality improvement to facilitate export. **For the export situation in 2023, the exports of rice, sugar and soybean become greater than the previous year. The increase in rice export** is because the demand for products in the global market is rising due to two key factors: the conflict between Russia and Ukraine and the global economic recovery. Moreover, the price of Thai rice remains competitive. **The increase in soybean export** is due to the increasing demand for soybean and Thai soybean products from neighboring countries. **The increase in sugar export** is due to the increase in of domestic production and the increasing demand of sugar from Southeast Asia countries. **The export of maize is forecast to decline** because the domestic demand of maize for the animal feed industry has increased resulted in the decreasing maize export to the Asia markets such as the Philippines, Hong Kong, Indonesia, and Japan. **The export of cassava is forecast to decline** because the production in country decrease.

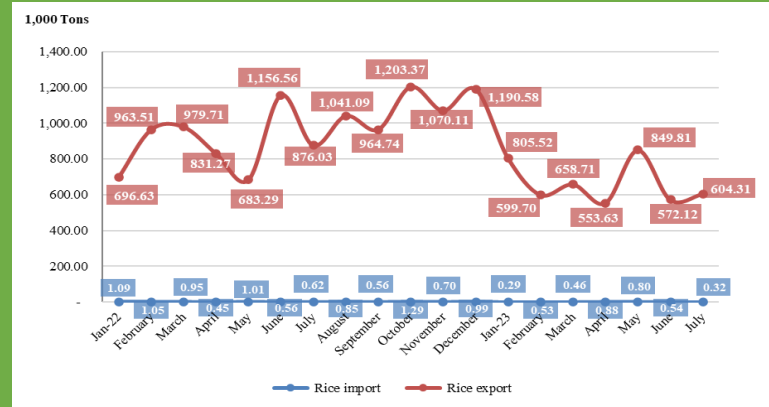


Figure 1: Monthly quantity of rice import and export in 2022-2023

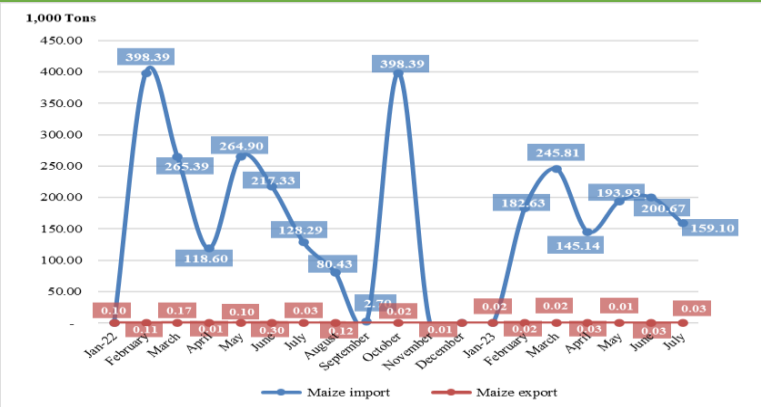


Figure 2: Monthly quantity of maize import and export in 2022-2023

**Rice production in 2024 (the crop year 2023/24)** is predicted to decrease due to decrease in planted area and yield resulting from the unfavorable weather include drought, diseases and pest. Consequently, the planted areas were damaged by 500,000 hectares (35%) which resulted in declining in its harvested area. The harvesting period of rice in 2024 is from August 2023 to April 2024 for wet season, and February 2024 to October 2024 for dry season.

**The production of maize in 2024 (the crop year 2023/24)** is forecast to decrease due to the decrease in yield resulting from the unfavorable weather including drought. Consequently, the planted areas were damaged around 19,000 hectares (1%) which declined in its harvested area. The harvesting period of maize in 2024 is from June 2023 to February 2024 for wet season, and February 2024 to May 2024 for dry season.



Crop Situation in 2023 (P.2/2)

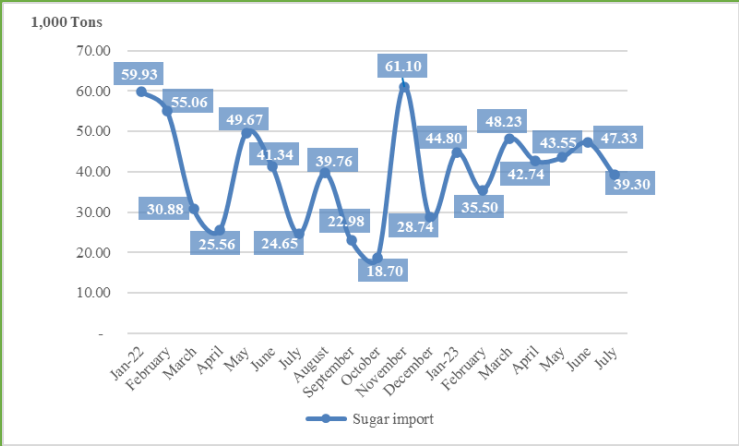


Figure 3: Monthly quantity of sugar import in 2022-2023

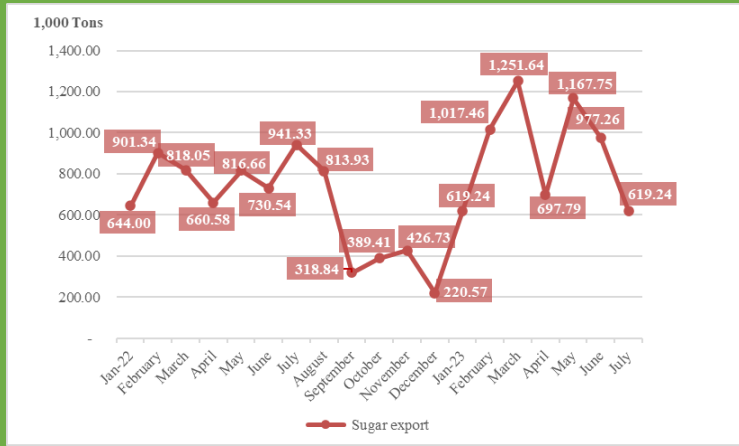


Figure 4: Monthly quantity of sugar export in 2022-2023

For sugarcane, the production in 2024 (the crop year 2023/24) is forecast to decrease as the planted area and yield tend to decrease resulting from the farmers respond to price decrease and increasing prices of agricultural inputs, such as fertilizer, seeds, and pesticides. The harvesting period of sugarcane in 2024 is from December 2023 to April 2024.

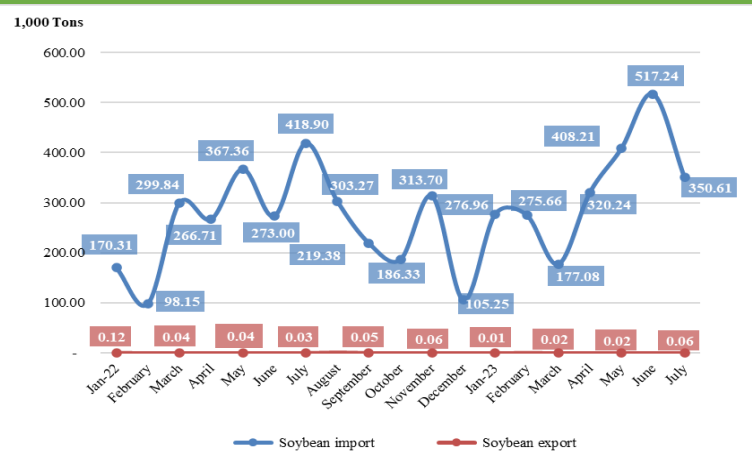


Figure 5: Monthly quantity of soybean import and export in 2022-2023

The planted area and production of cassava in 2024 (the crop year 2023/24) are forecast to decrease because of the unfavorable weather include drought. The other reasons which affect to decrease production are disease, pesticides and lack of stem cutting. Consequently, the planted areas were damaged around 150,000 which resulted in declining in its harvested area. The harvesting period of cassava in 2024 is from October 2023 to September 2024.

The production of soybean in 2024 (the crop year 2023/24) is forecast to decrease as the planted area tends to decrease from the unfavorable weather include drought. Moreover, the net return for soybean cultivation is not worth the investment as a result farmers switched to plant other crops which give a better net return such as rice, maize, green beans, vegetables and etc. The harvesting period of soybean in 2024 is from July 2023 to December 2023 for wet season, and from January 2024 to May 2024 for dry season.

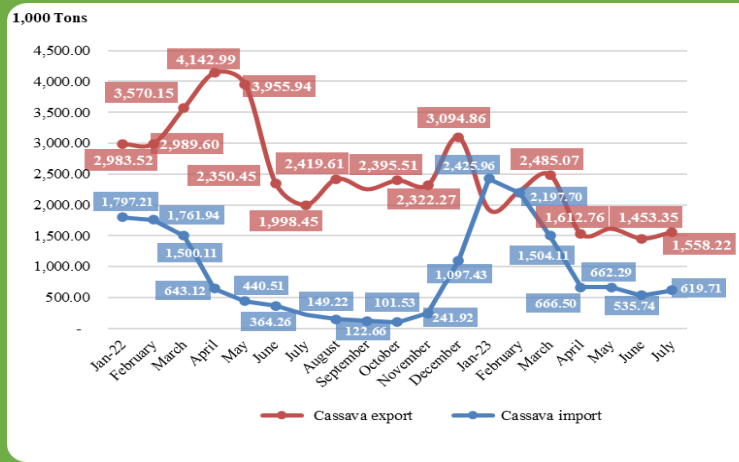


Figure 6: Monthly quantity of cassava import and export in 2022-2023

# VIETNAM



## Crop Situation in 2023 (P.1/2)

**The weather condition, impact of climate change or global warming on crop production, and trade of Vietnam in 2023.** There has been no unusual change in weather and climate conditions that considerably affect agricultural commodities in Vietnam. The situation of agricultural, forestry and fishery production and business in the first 8 months of 2023 is relatively stable. The supply of essential goods is guaranteed, and there are no unusual fluctuations in prices of agricultural commodities in August. Meanwhile, trade of Vietnam’s agricultural commodities to and from major markets in the first 8 months of 2023 has been facing difficulties, causing total export value to decline by 9.5%, and total import value to reduce by 12.9%.

**Rice:** In the first 8 months of 2023, the weather is considered favorable for the growth of rice. Wet season rice yield is forecasted to be the same in 2022. Regarding trade, rice exports in the first 8 months of 2023 increased by 21.4% in volume and 35.7% in value. It is forecasted that in the coming time, Vietnam's rice exports will continue to increase due to the demand from importing countries.

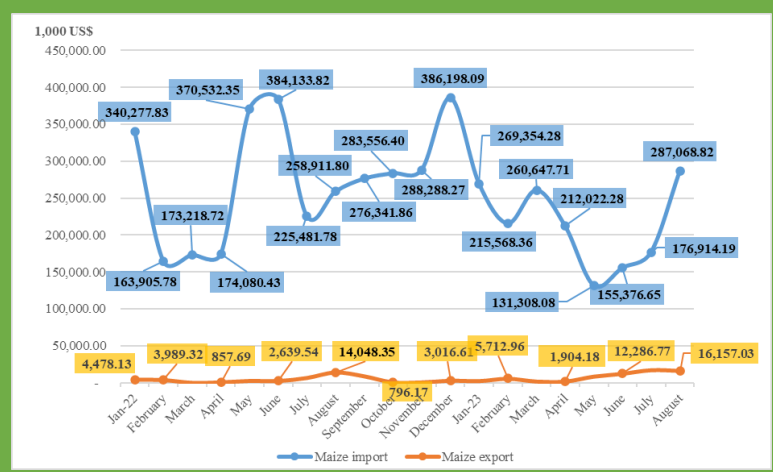


Figure 2: Monthly value of maize import and export in 2022-2023

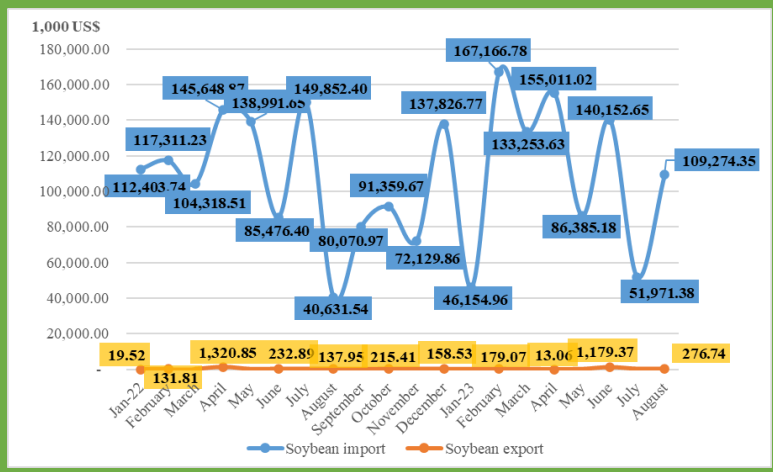


Figure 3: Monthly value of soybean import and export in 2022-2023

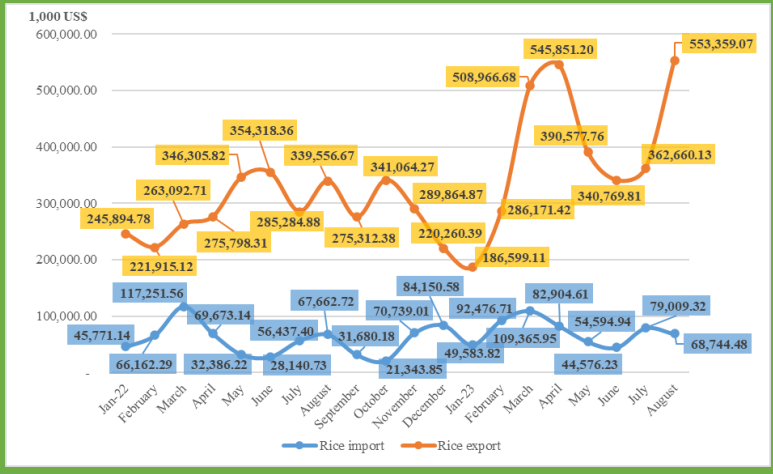


Figure 1: Monthly value of rice import and export in 2022-2023

**Maize and soybean:** Due to the continuous increase in production input costs, maize and soybean production are not efficient. Therefore, the area under maize and soybean cultivation has continuously decreased over the years. The area of maize in 2023 will reach 775.1 thousand hectares, a decrease of 6.7 thousand hectares compared to 2022. The area of soybean in 2023 will reach 26.5 thousand hectares, a decrease of 0.1 thousand hectares compared to 2022. In the first 8 months of 2023, Vietnam's import volume of maize was estimated at 5.35 million tons, a decrease of 8.8% compared to the same period in 2022, mainly due to the continuous decrease from March to July. Meanwhile, the import volume of soybean was estimated at 1.37 million tons, an increase of 7.1% year-on-year in 2022.



# VIETNAM



## Crop Situation in 2023 (P.2/2)

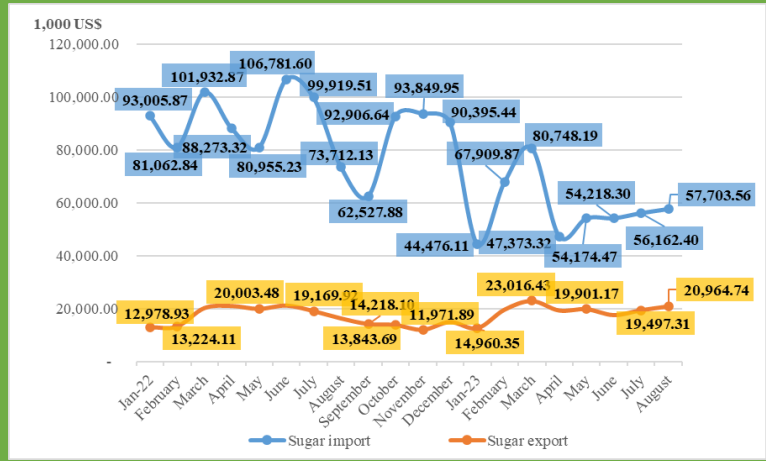


Figure 4: Monthly value of sugar import and export in 2022-2023

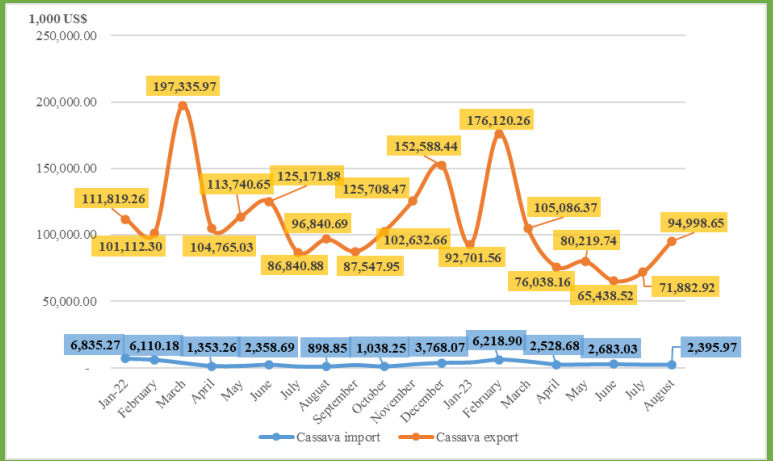


Figure 5: Monthly value of cassava import and export in 2022-2023

**Sugarcane:** In recent years, the source of sugarcane raw materials for production of Vietnamese sugar factories has been showing signs of significant decline. Vietnam's food and beverage businesses are facing pressure from a lack of domestic sugar supply and imports of this product are being greatly affected by regulations on export restrictions from India, Brazil, and etc. The import value of sugar of Vietnam in the first 8 months of 2023 is estimated to decrease considerably by 36.2% compared to the same period of 2022, while the export value is projected to increase slightly by 5.7%.

**Cassava:** In the first 8 months of 2023, the export value of Vietnam's cassava is estimated to decrease by 18.9% compared to the same period of 2022 because Vietnam's cassava exports to the key exporting market, China, are fiercely competing with other large markets such as Thailand, Laos, and Cambodia. Meanwhile, Vietnam's import value of cassava during the first 8 months of 2023 is estimated to increase by 17.4%, due to an increase in cassava import from Laos. There is no updated information about the situation of cassava production in Vietnam over the last few months.

